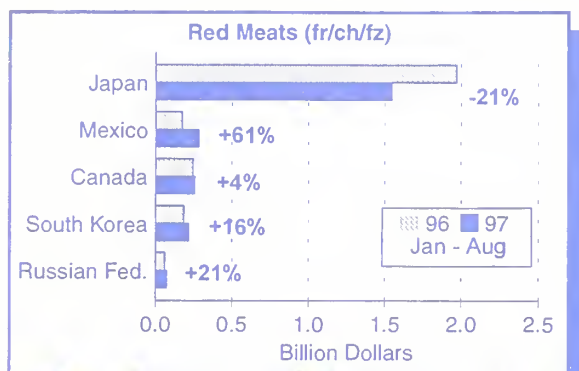


Historic, Archive Document

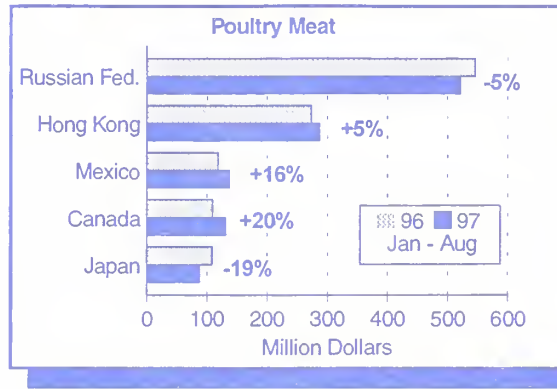
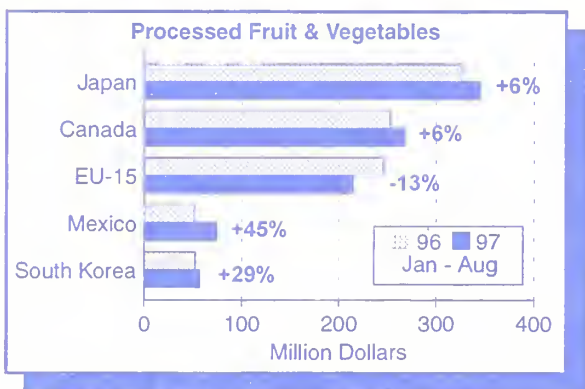
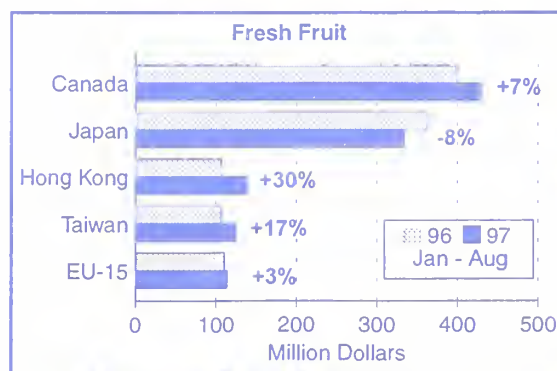
Do not assume content reflects current scientific knowledge, policies, or practices.

Agricultural Trade Highlights

Consumer Food Trade Trends...



Top Five Markets



Inside This Issue!

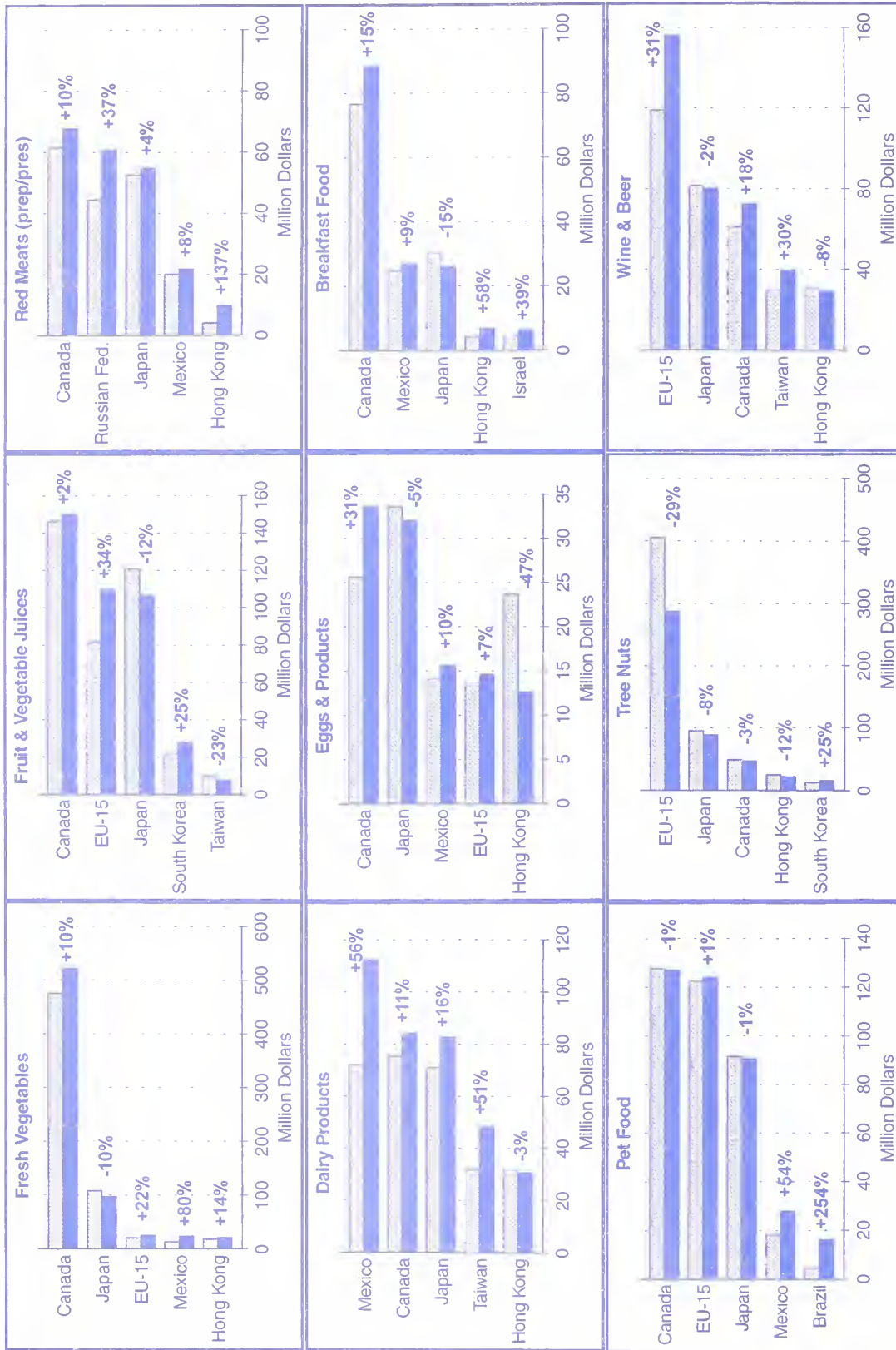
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Trade Trend Top Five Markets for Selected U.S. Consumer Foods

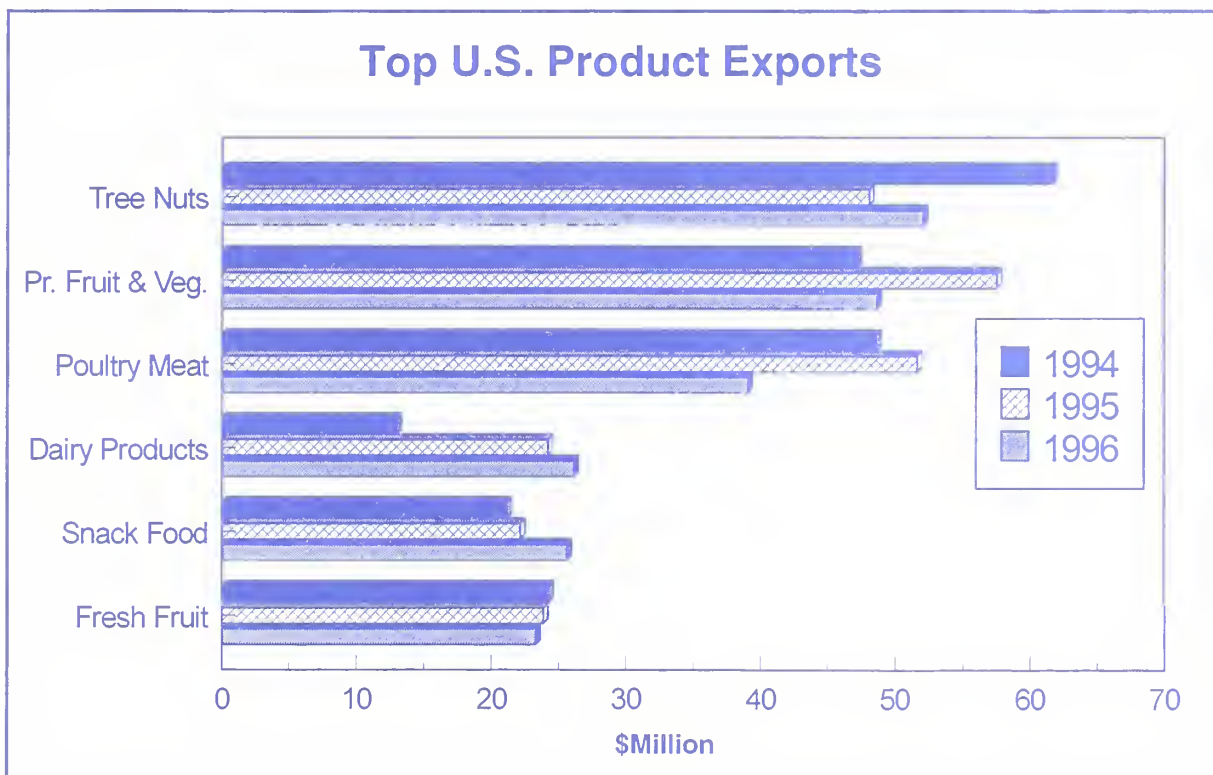
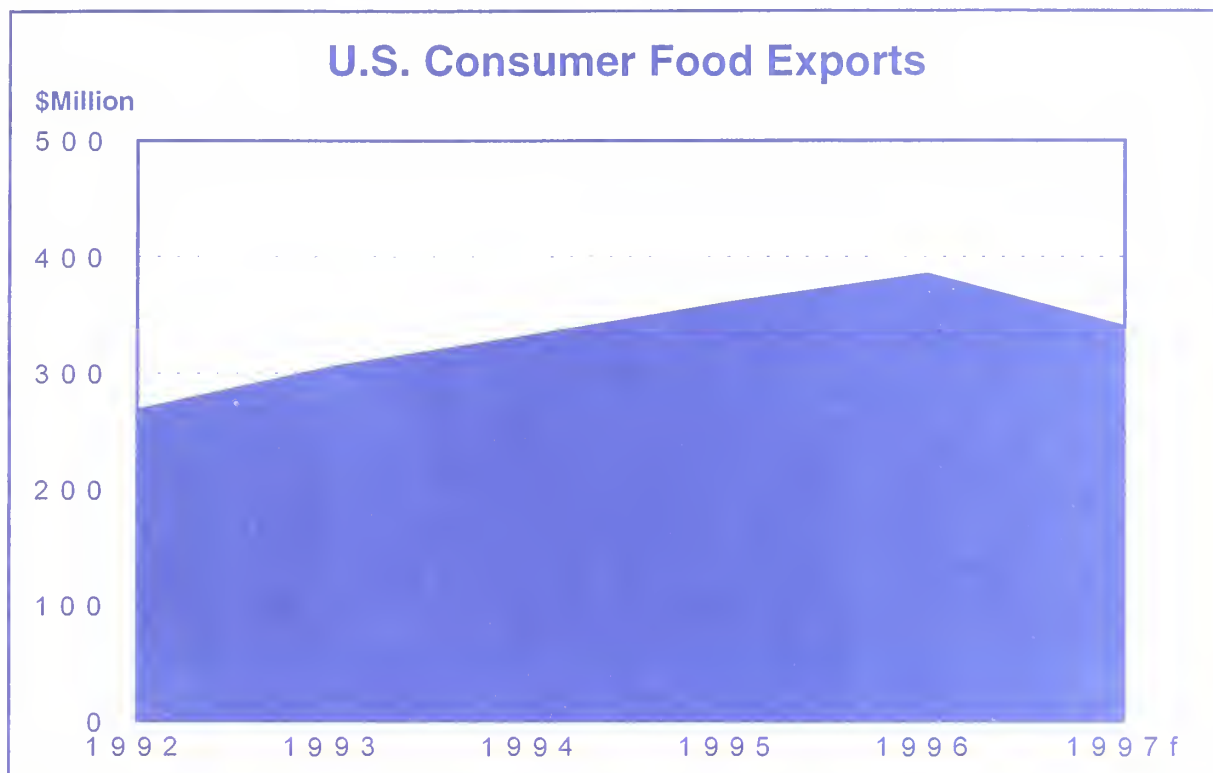
January - August Comparisons

CY 96 CY 97

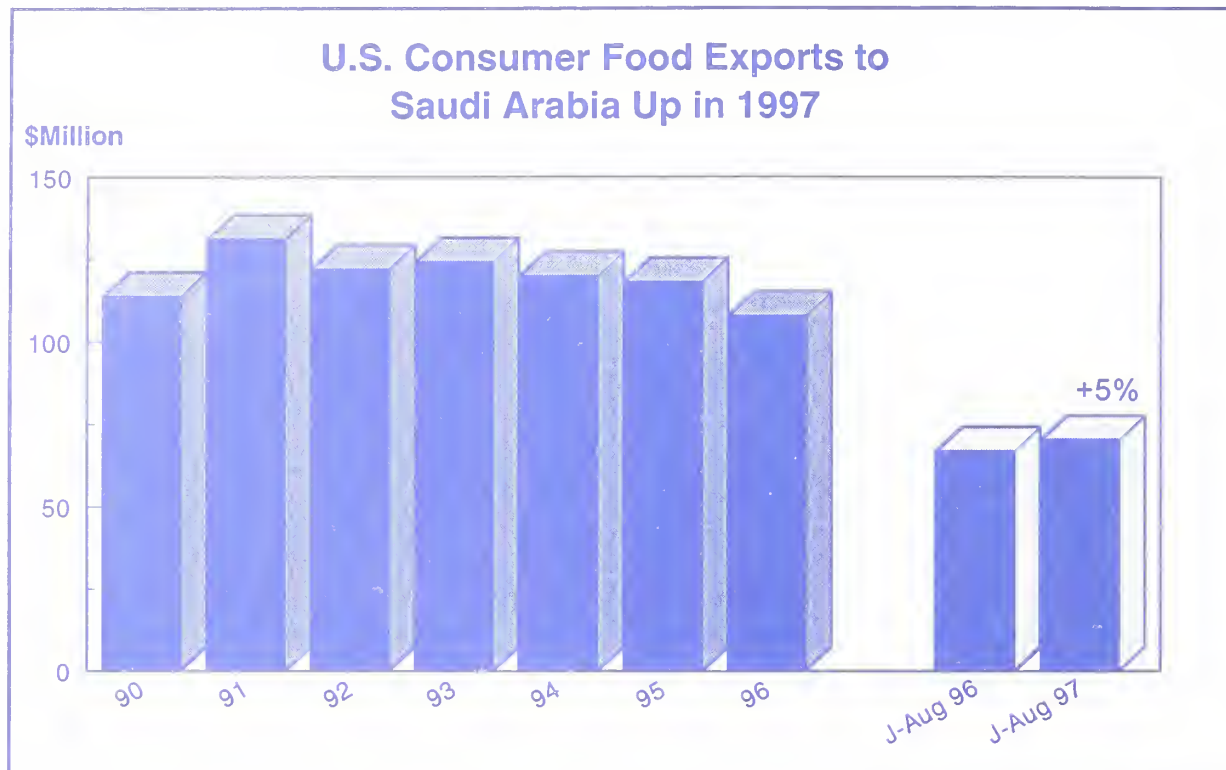


Note: Percentages are computed as the change from 1996 to 1997.

Regional Snapshot: Middle East



Snapshot: Saudi Arabia



Competition Among Supermarkets Increases Store Numbers & Quality

- Supermarkets are expanding--class "A" stores currently number 250.
- Competition among stores has increased and advertising has become more important. Price is still the most important attribute, but managers are also interested in promotional and advertising support and are looking to expand the range of products.
- Supermarket trips are an important form of family entertainment; many stores have play areas for children.
- The increasing use of bar coding will eliminate many redundant products, such as the twenty-five different varieties of ketchup carried at one supermarket.
- Every supermarket has a frozen foods section. Frozen food is

replacing canned because it is viewed as fresher.

Marketing Efforts Target Diverse Population

- Companies often want to use their own private labels on imported products that initially test well in the market. Some imported products may be sold as both private label and branded in order to target different customer segments, ex-patriate and Arab.
- "Made in Saudi Arabia" is becoming an important marketing strategy as the Government promotes local food processing as a way to diversify the economy. The majority of processed products "produced" in Saudi Arabia use imported inputs. In fact, food processors often import foods already processed and repackage them into retail-sized

Top Sales Prospects

- honey
- rice
- frozen poultry
- beverages
- snack foods
- fresh fruits & vegetables
- dairy products
- vegetable oil

packages under their own labels.

- Recent product introductions include frozen bagels, bags of ready-made salad from California, and free-range chicken meat.
- Exporting houses in the U.S. are a useful link to Saudi Arabia. They can help prepare products for sale, including affixing labels with the Arabic language.
- Products from the United States are viewed as being premium in quality.

...Saudi Arabia

Ex-Pats, Women Shift Food Demand

- Many consumers are fighting obesity; diet foods are popular.
- Women are beginning to enter the workforce and make purchasing decisions.
- Families are living in smaller units; more and more, they can't afford maids, so prepared foods have become more popular.
- The expatriate population is changing; more families live in the Kingdom than in previous decades when single working-age males were the norm.

Saudi Arabia is Part of GCC

- Saudi Arabia is part of the Gulf Cooperation Council (GCC), which also includes Oman, UAE, Kuwait, Bahrain, and Qatar. Food processed in Saudi Arabia may be

marketed in all GCC countries duty free.

- Shelf-life requirements for all GCC countries have been reduced for many products over the past two years, including tomato puree and paste, baby foods, and stuffed biscuits.

Population Growing Faster Than Economy

- Per capita GDP is \$6,800; the Saudi economy is at the mercy of oil prices. Recent forecasts predicted a slowdown from recent record GDP growth of 4 percent in 1996.
- The population is growing faster than the economy and is very young, with half under 17. The Saudi population is 19.5 million, including 6.5 million ex-pats, and

is expected to double over the next 20 years.

- Farms are diversifying crop output as Government policies de-emphasize surplus wheat production. As a result, production of fresh fruits and vegetables has increased.
- Cold storage warehouses and food processing plants have increased significantly over the past four years.

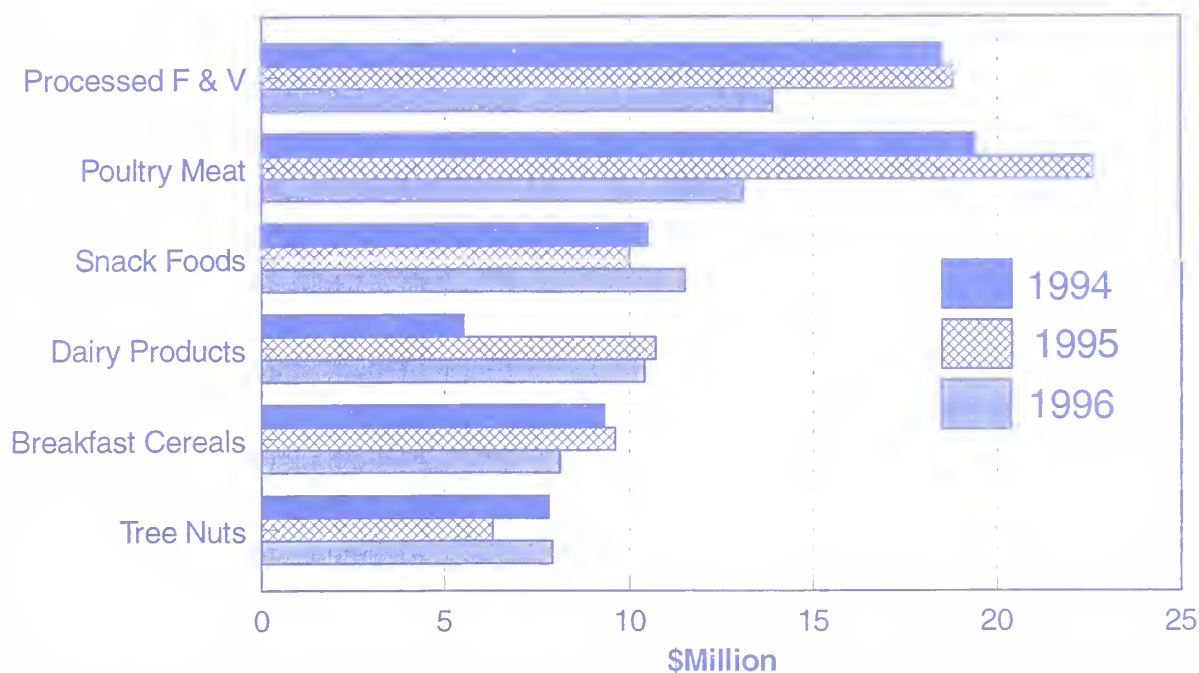
For more information on exporting to Saudi Arabia, contact:

John Wilson, Agricultural Trade Office Director in Riyadh.

Tel: (966-1)488-3800, ext. 1560

Fax: (966-1)482-4364

Top U.S. Consumer Food Exports to Saudia Arabia



U.S. EXPORTS OF AGRICULTURAL, FISH & FORESTRY PRODUCTS TO SAUDI ARABIA
CY 1992 - 1996 AND YEAR-TO-DATE COMPARISONS
(IN THOUSANDS OF DOLLARS)

EXPORT MARKET: SAUDI ARABIA

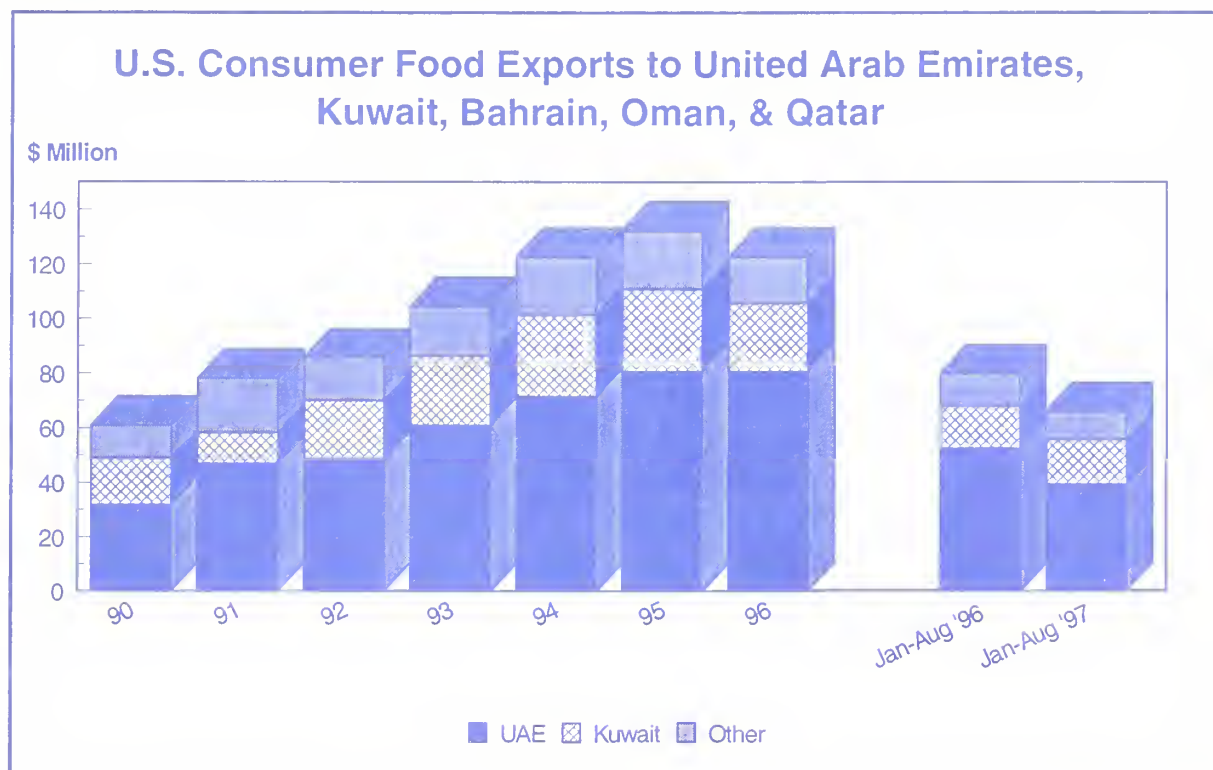
PRODUCT	CALENDAR YEARS (JAN-DEC)					JANUARY - AUGUST COMPARISONS		%
	1992	1993	1994	1995	1996	1996	1997	
BULK AGRICULTURAL TOTAL.....	183,652	189,659	188,700	248,280	255,121	174,794	149,649	-14.39
WHEAT.....	202	171	9	16	120	66	28	-58.21
COARSE GRAINS.....	77,987	90,118	98,214	160,815	180,945	137,896	100,392	-27.20
RICE.....	101,911	96,620	87,290	82,073	71,418	34,833	46,884	34.60
SOYBEANS.....	5	31	38	0	0	0	0	-
COTTON.....	133	68	144	2,761*	1,006	1,006	1,331	32.29
TOBACCO.....	0	0	0	0	11	0	0	-
PULSES.....	1,577	1,284	846	1,121	845	588	215	-63.45
PEANUTS.....	905	834	713	903	175	66	127	90.85
OTHER BULK COMMODITIES.....	932	533	1,446	591	601	338	673	98.78
INTERMEDIATE AGRICULTURAL TOTAL.....	154,285	132,127	149,111	151,442	187,294*	121,594	163,615	34.56
WHEAT FLOUR.....	0	0	0	42	64	64	0	-100.0
SOYBEAN MEAL.....	37,481	56,406	44,657	54,302	99,793*	77,210	92,293	19.54
SOYBEAN OIL.....	105	47	336	1,211	4	4	143	3522.0
VEGETABLE OILS (EXCL SOYBEAN OIL).....	39,342	37,193	59,243*	56,983	39,223	20,345	34,189	68.05
FEEDS & FODDERS (EXCL PET FOODS).....	629	650	516	839	946	876	558	-36.26
LIVE ANIMALS.....	3,129	5,214	5,289*	2,043	2,273	750	2,219	195.82
HIDES & SKINS.....	10	0	7	0	0	0	236	-
ANIMAL FATS.....	8	24	94	1,606	1,455	652	2,538*	289.18
PLANTING SEEDS.....	53,217	13,926	16,137	11,151	12,112	4,557	8,596	88.64
SUGARS, SWEETENERS, & BEVERAGE BASES..	17,124	15,045	20,517	19,395	23,901*	13,677	18,926	38.38
OTHER INTERMEDIATE PRODUCTS.....	3,239	3,620	2,313	3,871	7,522	3,459	3,916	13.20
CONSUMER-ORIENTED AGRICULTURAL TOTAL....	122,077	124,340	119,984	118,269	108,059	67,055	70,350	4.91
SNACK FOODS (EXCL NUTS).....	11,395	12,530	10,481	10,002	11,482	6,975	10,122	45.11
BREAKFAST CEREALS & PANCAKE MIX.....	8,854	12,531*	9,311	9,572	8,062	4,613	5,564	20.64
RED MEATS, FRESH/CHILLED/FROZEN.....	7,443	6,278	4,807	5,257	5,102	3,455	3,230	-6.51
RED MEATS, PREPARED/PRESERVED.....	1,416	1,524	2,148	2,392	2,870	2,085	1,966	-5.71
POULTRY MEAT.....	16,299	17,801	19,399	22,585*	13,123	11,413	5,755	-49.58
DAIRY PRODUCTS.....	9,615	7,329	5,536	10,725*	10,400	8,807	6,932	-21.28
EGGS & PRODUCTS.....	329	111	294	117	7	7	34	394.33
FRESH FRUIT.....	8,660	12,219	14,170	8,816	7,698	951	7,872	728.17
FRESH VEGETABLES.....	196	164	348	436	112	86	56	-34.50
PROCESSED FRUIT & VEGETABLES.....	23,173	22,482	18,532	18,879	13,901	8,149	9,748	19.62
FRUIT & VEGETABLE JUICES.....	2,261	1,820	1,566	1,525	1,531	1,090	892	-18.12
TREE NUTS.....	7,625	5,764	7,830	6,284	7,938	3,510	699	-80.08
WINE & BEER.....	73	175	54	107	21	9	0	-100.0
NURSERY PRODUCTS & CUT FLOWERS.....	557	681	389	406	168	63	130	105.45
PET FOODS (DOG & CAT FOOD).....	461	231	253	187	457	374	159	-57.58
OTHER CONSUMER-ORIENTED PRODUCTS.....	23,719	22,700	24,867	20,977	25,188	15,468	17,189	11.12
FOREST PRODUCTS (EXCL PULP & PAPER).....	40,465	26,649	13,150	25,375	24,191	16,007	16,216	1.31
LOGS.....	79	708	635	1,218	1,369*	716	950	32.66
LUMBER.....	11,634	11,509	6,298	14,848	16,404	11,551	7,713	-33.22
PANEL PRODUCTS (INCL PLYWOOD).....	4,918	6,215	1,672	5,170	3,350	2,433	1,970	-19.03
OTHER WOOD PRODUCTS.....	23,834	8,217	4,545	4,139	3,067	1,307	5,583	327.14
FISH & SEAFOOD PRODUCTS, EDIBLE.....	1,736	1,292	1,625	1,545	902	576	700	21.65
SALMON, WHOLE OR Eviscerated.....	697*	257	588	375	0	0	0	-
SALMON, CANNED.....	59	10	6	0	5	5	23	353.01
CRAB & CRABMEAT.....	34	83	0	0	0	0	133	-
ROE & URCHIN (FISH EGGS).....	0	6	0	0	0	0	0	-
OTHER EDIBLE FISH & SEAFOOD.....	946	936	1,032	1,169	897	571	544	-4.59
AGRICULTURAL PRODUCT TOTAL	460,015	446,125	457,795	517,991	550,474*	363,443	383,614	5.55
AGRICULTURAL, FISH & FORESTRY TOTAL	502,216	474,066	472,570	544,911	575,567	380,025	400,531	5.40

ANALYSIS BY: COMMODITY AND MARKETING PROGRAMS/FAS/USDA

SOURCE: U.S. BUREAU OF THE CENSUS TRADE DATA

NOTE: * DENOTES HIGHEST EXPORT LEVELS SINCE AT LEAST CY 1970

Snapshot: Gulf Cooperation Council-5



Regional Facts: GCC-5

- GCC-5 countries have among the world's highest GDP per capita: Qatar--\$16,200, Kuwait--\$14,700, UAE--\$15,600, Bahrain--\$8,900, and Oman--\$6,900 (per capita GDP is representative of disposable income due to low income taxes and other income deductions).
- Total regional population is 7.7 million, growing 4 percent annually.
- Oil is a major factor in economic performance. The IMF projects economic growth of 3 percent for the region in 1997.

Retail Trend: Cooperative Societies

- Twenty-four major, upscale supermarket chains now exist in the region, the majority privately owned.
- The mark up on most food items averages 10-15 percent above wholesale; annual sales per company range between \$10 and \$30 million.
- Cooperatives account for 20 percent of retail food sales in the

UAE, 75 percent of sales in Kuwait, 40 to 50 percent in Qatar, and 7 percent in Bahrain.

Tourism Industry Rapidly Expanding

- Twenty, five-star hotels will be built or renovated, primarily in Dubai.
- Restaurants in hotels demand high quality and safety assurances.
- U.S. products in demand include: chilled and frozen beef, frozen vegetables (especially corn-on-the-cob), french fries, and condiments.

Dubai Major Transshipment Center •

Nearly 60 to 70 percent of total UAE imports are re-exported.

- Azerbaijan, Saudi Arabia, and Iran account for 45 percent of all re-exports over \$670 million in 1995.
- Exports to Azerbaijan grew from \$0.9 million in 1993 to \$60 million in 1995.
- Several Dubai-based food companies have opened offices and retail outlets in Baku, Azerbaijan.

Top Sales Prospects

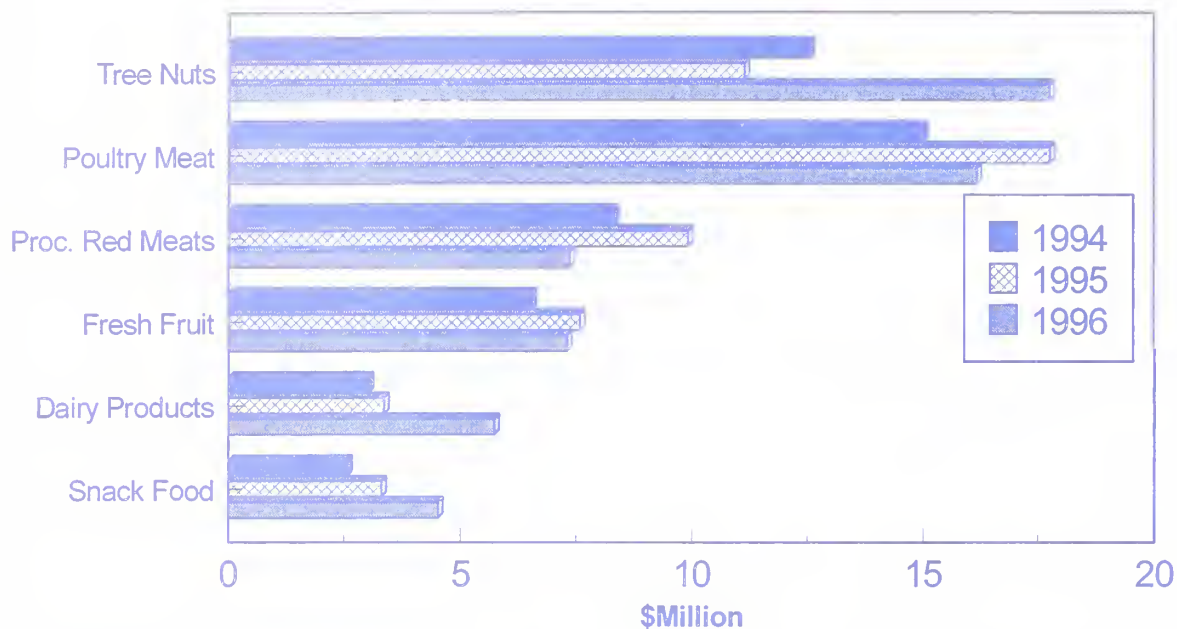
- convenience and snack foods
- health and diet foods (low fat, low calorie)
- fresh, frozen, and canned fruits and vegetables
- condiments
- ice cream
- cookies
- confectionery products
- processed dairy products
- breakfast cereals

For more information on exporting to GCC-5 countries, contact:

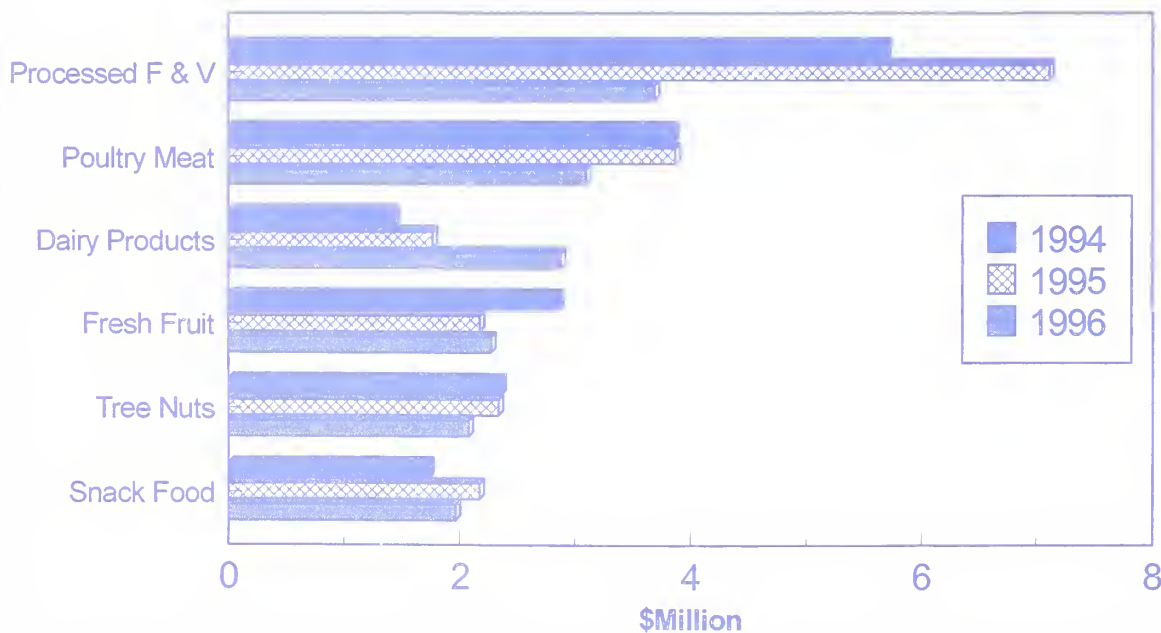
*Edwin Porter, Agricultural Trade
Office Director in Dubai.
Tel: (971-4)314-063
Fax: (971-4)314-998
E-mail: atodubai@emirates.net.ae*

Snapshot: Middle East

Top U.S. Products Exported to UAE



Top U.S. Products Exported to Kuwait



U.S. EXPORTS OF AGRICULTURAL, FISH & FORESTRY PRODUCTS TO UNITED ARAB EMIRATES
CY 1992 - 1996 AND YEAR-TO-DATE COMPARISONS
(IN THOUSANDS OF DOLLARS)

EXPORT MARKET: UNITED ARAB EMIRATES

PRODUCT	CALENDAR YEARS (JAN-DEC)					JANUARY - AUGUST COMPARISONS		% CHANGE
	1992	1993	1994	1995	1996	1996	1997	
BULK AGRICULTURAL TOTAL.....	8,944	10,719	6,316	30,377	9,965	3,702	2,477	-33.08
WHEAT.....	0	119	19	11,128*	41	10	87	743.60
COARSE GRAINS.....	3,997	3,043	2,382	5,357	6,526	1,458	14	-99.06
RICE.....	2,251	4,622	2,180	8,633	1,324	881	886	0.62
SOYBEANS.....	0	0	0	21	0	0	0	-
COTTON.....	38	6	0	0	0	0	8	-
TOBACCO.....	219	247	112	2,625	254	229	93	-59.48
PULSES.....	871	1,238	716	1,616	1,121	856	400	-53.25
PEANUTS.....	1,139*	710	490	581	22	9	32	243.09
OTHER BULK COMMODITIES.....	428	734	416	415	677	258	956*	270.41
INTERMEDIATE AGRICULTURAL TOTAL.....	13,502	22,652	31,746	45,147*	29,957	16,727	17,213	2.91
WHEAT FLOUR.....	24	43	44	25	85	76	18	-76.09
SOYBEAN MEAL.....	36	20	24	82	61	32	0	-100.0
SOYBEAN OIL.....	31	843	1,341	1,612	3,871*	2,869	1,642	-42.77
VEGETABLE OILS (EXCL SOYBEAN OIL).....	2,985	3,692	9,963	15,832*	7,634	5,638	8,363	48.35
FEEDS & FODDERS (EXCL PET FOODS).....	188	657	341	626	808*	428	602	40.61
LIVE ANIMALS.....	2,399	7,127	9,699*	9,691	5,115	1,287	567	-56.00
HIDES & SKINS.....	90	0	599*	10	118	114	15	-86.83
ANIMAL FATS.....	0	3	18	3,333*	19	16	0	-100.0
PLANTING SEEDS.....	2,315	3,595	2,133	5,755*	3,960	3,068	1,572	-48.77
SUGARS, SWEETENERS, & BEVERAGE BASES..	4,760	5,204	6,470	7,132	7,578*	2,759	3,980	44.27
OTHER INTERMEDIATE PRODUCTS.....	674	1,467	1,114	1,049	706	439	454	3.26
CONSUMER-ORIENTED AGRICULTURAL TOTAL....	48,561	60,985	71,646	80,652	80,689*	52,569	39,298	-25.25
SNACK FOODS (EXCL NUTS).....	2,091	2,896	2,564	3,308	4,521	3,232	4,527*	40.08
BREAKFAST CEREALS & PANCAKE MIX.....	373	1,259	2,140	2,511*	1,250	881	685	-22.27
RED MEATS, FRESH/CHILLED/FROZEN.....	1,456	1,720	1,522	2,065	2,074	1,387	1,418	2.23
RED MEATS, PREPARED/PRESERVED.....	100	142	365	777	763	650	279	-57.00
POULTRY MEAT.....	10,664	10,181	15,008	17,755*	16,167	14,658	5,682	-61.24
DAIRY PRODUCTS.....	1,761	2,858	3,022	3,361	5,734*	5,350	1,484	-72.26
EGGS & PRODUCTS.....	2,139	4,324	6,500	7,803	3,927	3,689	1,399	-62.08
FRESH FRUIT.....	3,936	4,675	6,539	7,587	7,303	2,487	6,834	174.81
FRESH VEGETABLES.....	1,440	1,552	1,785	1,685	1,347	795	925	16.35
PROCESSED FRUIT & VEGETABLES.....	7,174	7,464	8,315	9,918*	7,361	5,120	3,857	-24.67
FRUIT & VEGETABLE JUICES.....	1,350	2,141	1,997	2,162	2,572	2,177	2,157	-0.96
TREE NUTS.....	10,461	14,013	12,546	11,138	17,749*	5,866	3,511	-40.14
WINE & BEER.....	985	1,218	1,944	1,723	2,404*	1,764	1,152	-34.68
NURSERY PRODUCTS & CUT FLOWERS.....	522	1,228	812	684	64	64	31	-52.06
PET FOODS (DOG & CAT FOOD).....	55	155	174	165	243*	111	70	-36.98
OTHER CONSUMER-ORIENTED PRODUCTS.....	4,053	5,159	6,413	8,009*	7,211	4,338	5,287	21.87
FOREST PRODUCTS (EXCL PULP & PAPER).....	2,643	5,455	5,177	5,719	13,673*	10,992	4,552	-58.59
LOGS.....	0	114	17	43	439	338	40	-88.19
LUMBER.....	1,152	1,991	2,987	3,782	4,449	2,749	3,573	29.97
PANEL PRODUCTS (INCL PLYWOOD).....	591	782	723	393	977	433	334	-22.72
OTHER WOOD PRODUCTS.....	901	2,566	1,450	1,502	7,808*	7,473	605	-91.90
FISH & SEAFOOD PRODUCTS, EDIBLE.....	271	285	792*	321	264	150	178	18.91
SALMON, WHOLE OR Eviscerated.....	198	230	272	80	0	0	5	-
SALMON, CANNED.....	30	6	71	11	12	6	0	-100.0
CRAB & CRABMEAT.....	0	5	0	3	0	0	35*	-
ROE & URCHIN (FISH EGGS).....	4	5	0	0	13*	13	5	-58.50
OTHER EDIBLE FISH & SEAFOOD.....	39	39	450*	226	240	131	133	1.20
AGRICULTURAL PRODUCT TOTAL	71,006	94,356	109,709	156,175*	120,610	72,998	58,988	-19.19
AGRICULTURAL, FISH & FORESTRY TOTAL	73,921	100,096	115,677	162,215*	134,548	84,140	63,718	-24.27

ANALYSIS BY: COMMODITY AND MARKETING PROGRAMS/FAS/USDA

SOURCE: U.S. BUREAU OF THE CENSUS TRADE DATA

NOTE: * DENOTES HIGHEST EXPORT LEVELS SINCE AT LEAST CY 1970

U.S. Agricultural Export Value by Region

Monthly and Annual Performance Indicators

	August			October-August			Fiscal Year		
	1996	1997	Chg	FY '96	FY '97	Chg	1996	1997(f)	Chg
	-- \$Billion --			-- \$Billion --			-- \$Billion --		
Western Europe	0.515	0.616	20%	8.607	8.593	-0%	9.275	9.5	2%
European Union 1/	0.479	0.548	15%	8.272	8.087	-2%	8.913	9.0	1%
Other Western Europe	0.036	0.067	87%	0.335	0.507	51%	0.363	0.5	38%
Central & Eastern Europe	0.018	0.019	3%	0.356	0.284	-20%	0.399	0.3	-25%
Former Soviet Union	0.178	0.138	-23%	1.530	1.461	-5%	1.650	1.5	-9%
Russian Federation	0.124	0.099	-20%	1.136	1.178	4%	1.235	1.4	13%
Asia	1.959	1.708	-13%	24.268	22.138	-9%	25.959	24.2	-7%
Japan	0.951	0.822	-14%	11.097	9.894	-11%	11.873	11.0	-7%
China	0.114	0.059	-48%	1.766	1.703	-4%	1.816	2.0	10%
Other East Asia	0.658	0.550	-16%	7.587	7.012	-8%	8.165	7.6	-7%
Taiwan	0.243	0.184	-24%	2.732	2.424	-11%	2.924	2.5	-15%
South Korea	0.289	0.211	-27%	3.458	3.101	-10%	3.710	3.5	-6%
Hong Kong	0.126	0.154	22%	1.396	1.484	6%	1.531	1.6	5%
Other Asia	0.236	0.278	18%	3.817	3.529	-8%	4.104	3.6	-12%
Pakistan	0.038	0.045	18%	0.338	0.360	6%	0.394	0.4	1%
Philippines	0.055	0.071	29%	0.828	0.807	-3%	0.904	0.9	-0%
Middle East	0.227	0.208	-8%	2.349	2.302	-2%	2.537	2.1	-17%
Israel	0.055	0.037	-32%	0.586	0.516	-12%	0.626	0.6	-4%
Saudi Arabia	0.055	0.050	-9%	0.538	0.530	-2%	0.579	0.6	4%
Africa	0.287	0.289	1%	2.688	1.997	-26%	2.952	1.8	-39%
North Africa	0.211	0.216	2%	1.873	1.286	-31%	2.071	1.1	-47%
Egypt	0.143	0.113	-20%	1.262	0.798	-37%	1.418	0.6	-58%
Algeria	0.012	0.057	373%	0.289	0.277	-4%	0.313	0.3	-4%
Sub-Saharan Africa	0.075	0.073	-4%	0.816	0.711	-13%	0.881	0.7	-21%
Latin America	0.877	0.840	-4%	9.145	9.166	0%	9.920	10.1	2%
Mexico	0.442	0.449	2%	4.650	4.663	0%	5.005	5.1	2%
Other Latin America	0.434	0.390	-10%	4.495	4.503	0%	4.915	5.0	2%
Brazil	0.079	0.040	-49%	0.521	0.428	-18%	0.577	0.5	-13%
Venezuela	0.038	0.042	10%	0.418	0.515	23%	0.446	0.6	35%
Canada	0.481	0.526	10%	5.466	6.030	10%	5.988	6.5	9%
Oceania	0.041	0.062	52%	0.427	0.482	13%	0.476	0.5	5%
World Total	4.619	4.417	-4%	55.426	52.781	-5%	59.795	56.5	-6%

Note: 1/ EU-15 includes the newest member states of Austria, Finland and Sweden.

FY 1997 forecasts (f) are based on USDA's "Outlook for U.S. Agricultural Exports," published August 28, 1997.

U.S. Exports of Agricultural, Fish & Forest Products by Major Group

Monthly and Annual Performance Indicators

Export Values	August			October-August			Fiscal Year			
	1996	1997	Chg	FY '96	FY '97	Chg	1996	1997(f)	1998(p)	97/98
	-- \$Billion --			-- \$Billion --			-- \$Billion --			Chg
Grains and Feeds 1/	1.818	1.408	-23%	19.934	15.056	-24%	21.553	16.1	17.3	7%
Wheat & Flour	0.801	0.515	-36%	6.356	3.745	-41%	7.032	4.0	4.6	15%
Rice	0.072	0.053	-27%	0.911	0.913	0%	1.004	1.0	1.0	0%
Coarse Grains 2/	0.608	0.488	-20%	8.816	6.421	-27%	9.338	6.9	7.5	9%
Corn	0.521	0.420	-19%	7.932	5.692	-28%	8.369	6.1	6.8	11%
Feeds & Fodders	0.202	0.222	10%	2.433	2.465	1%	2.627	2.6	2.5	-4%
Oilseeds and Products	0.692	0.659	-5%	9.072	10.735	18%	9.670	10.8	9.9	-8%
Soybeans	0.432	0.307	-29%	5.964	6.615	11%	6.312	6.9	6.1	-12%
Soybean Cakes & Meals	0.122	0.081	-33%	1.201	1.661	38%	1.305	1.7	1.4	-18%
Soybean Oil	0.007	0.053	637%	0.256	0.475	86%	0.272	0.5	0.6	20%
Other Vegetable Oils	0.063	0.080	27%	0.773	0.786	2%	0.836	N/A	N/A	NA
Livestock Products	0.614	0.714	16%	7.492	7.074	-6%	8.067	7.9	8.7	10%
Beef, Pork & Variety Meats	0.323	0.371	15%	4.065	3.624	-11%	4.343	4.2	4.8	14%
Hides, Skins & Furs	0.142	0.140	-2%	1.539	1.578	3%	1.677	1.7	1.8	6%
Poultry Products	0.274	0.232	-15%	2.489	2.615	5%	2.730	3.0	3.0	0%
Poultry Meat	0.243	0.202	-17%	2.145	2.255	5%	2.353	N/A	N/A	NA
Dairy Products	0.048	0.091	89%	0.672	0.764	14%	0.719	0.8	0.8	0%
Unmanufactured Tobacco	0.085	0.069	-19%	1.302	1.517	17%	1.393	1.6	1.6	0%
Cotton and Linters	0.100	0.167	67%	2.961	2.624	-11%	3.028	2.7	2.8	4%
Planting Seeds	0.042	0.056	33%	0.677	0.854	26%	0.727	0.9	0.9	0%
Horticultural Products	0.773	0.841	9%	9.094	9.667	6%	10.019	10.6	11.2	6%
Sugar & Tropical Products	0.173	0.180	4%	1.731	1.872	8%	1.886	2.1	2.3	10%
Forest Products 4/	0.630	0.619	-2%	6.480	6.901	7%	7.098	N/A	N/A	N/A
Fish and Seafood Products 4/	0.270	0.213	-21%	2.624	2.455	-6%	2.867	N/A	N/A	N/A
Total Agriculture	4.618	4.417	-4%	55.424	52.778	-5%	59.792	56.5	58.5	4%
Total Ag., Fish & Forest	5.518	5.249	-5%	64.528	62.135	-4%	69.757	N/A	N/A	N/A

Export Volumes	---- MMT----			---- MMT----			---- MMT----			
			Chg							Chg
Grains and Feeds 1/	8.484	8.921	5%	102.353	86.508	-15%	110.130	N/A	N/A	NA
Wheat	3.965	3.325	-16%	30.317	21.336	-30%	33.716	23.5	30.0	28%
Wheat Flour	0.032	0.032	0%	0.411	0.443	8%	0.470	0.5	0.5	0%
Rice	0.185	0.148	-20%	2.579	2.424	-6%	2.831	2.5	2.7	8%
Coarse Grains 2/	3.266	4.227	29%	55.583	48.676	-12%	58.656	52.2	58.2	11%
Corn	2.785	3.620	30%	50.137	42.979	-14%	52.681	46.0	52.0	13%
Feeds & Fodders	0.847	1.007	19%	11.258	11.364	1%	12.065	12.2	12.4	2%
Oilseeds and Products	2.074	1.631	-21%	29.052	32.177	11%	30.759	33.0	36.2	10%
Soybeans	1.431	1.021	-29%	21.240	22.868	8%	22.372	23.7	26.0	10%
Soybean Cakes & Meals	0.466	0.292	-37%	5.053	6.022	19%	5.445	6.1	6.6	8%
Soybean Oil	0.013	0.097	660%	0.424	0.855	102%	0.450	0.8	1.0	25%
Other Vegetable Oils	0.088	0.114	30%	1.060	1.169	10%	1.146	N/A	N/A	NA
Livestock Products 3/	0.247	0.300	21%	3.565	2.893	-19%	3.791	N/A	N/A	NA
Beef, Pork & Variety Meats	0.108	0.126	17%	1.313	1.234	-6%	1.410	1.4	1.6	14%
Poultry Products 3/	0.240	0.233	-3%	2.193	2.351	7%	2.383	N/A	N/A	NA
Poultry Meat	0.234	0.229	-2%	2.145	2.296	7%	2.330	2.5	2.6	4%
Dairy Products 3/	0.029	0.048	65%	0.419	0.405	-3%	0.445	N/A	N/A	NA
Unmanufactured Tobacco	0.014	0.009	-34%	0.206	0.228	11%	0.218	N/A	N/A	NA
Cotton & Linters	0.059	0.103	74%	1.662	1.576	-5%	1.703	1.6	1.6	0%
Planting Seeds	0.039	0.045	16%	0.610	1.134	86%	0.665	N/A	N/A	NA
Horticultural Products 3/	0.531	0.576	8%	6.593	6.995	6%	7.139	7.5	7.7	3%
Sugar & Tropical Products 3/	0.113	0.101	-10%	1.040	1.061	2%	1.137	N/A	N/A	NA
Total Agriculture 3/	11.829	11.965	1%	147.693	135.327	-8%	158.371	144.3	161.4	12%

Notes: 1/ Includes pulses, corn gluten feed and meal; 2/ Includes corn, oats, barley, rye and sorghum; 3/ includes only those items measured in metric tons; 4/ items not included in agricultural product totals. N/A = not available.

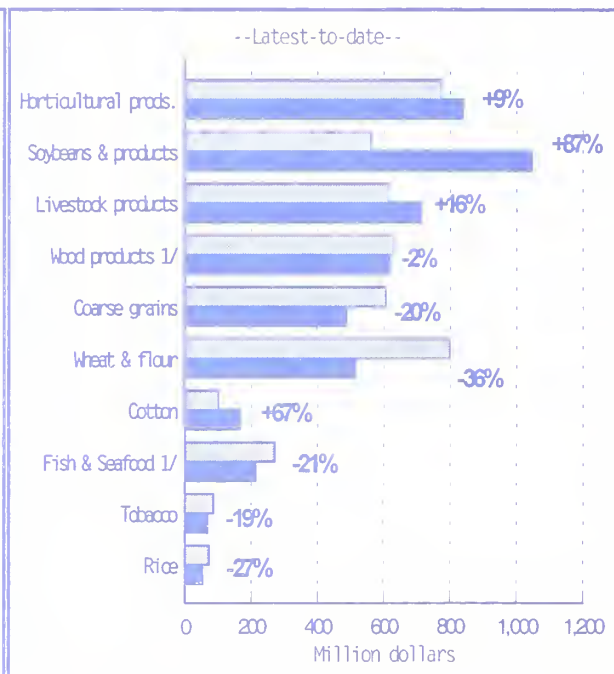
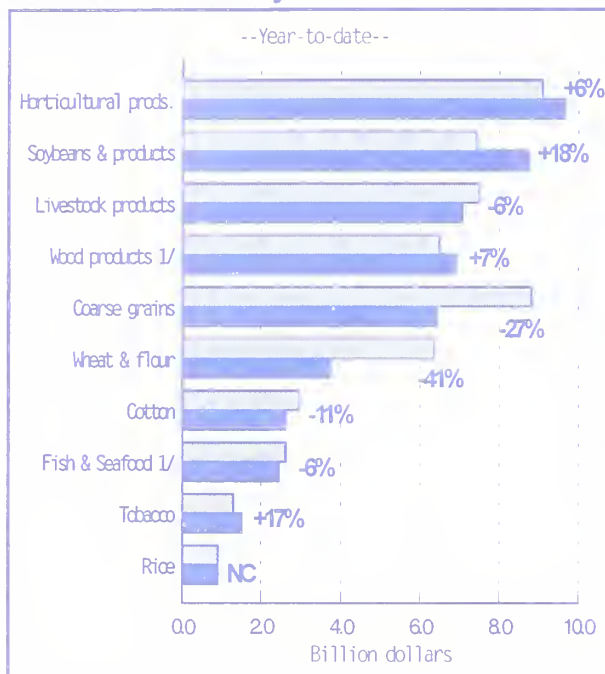
FY 1997 and 1998 forecasts (f) are based on USDA's "Outlook for Agricultural Exports," published August 28, 1997.

U.S. Agricultural, Fish, and Wood Export Summaries

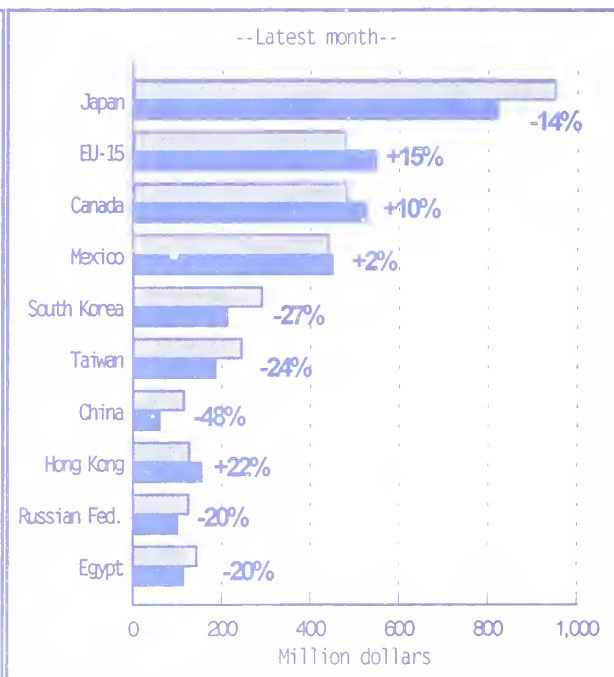
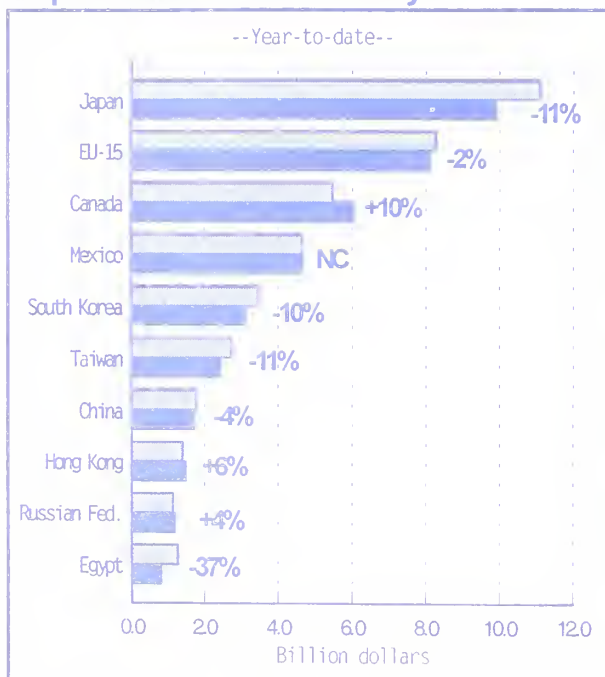
October-August and Latest Month Comparisons

FY 96 FY 97

Product Summary



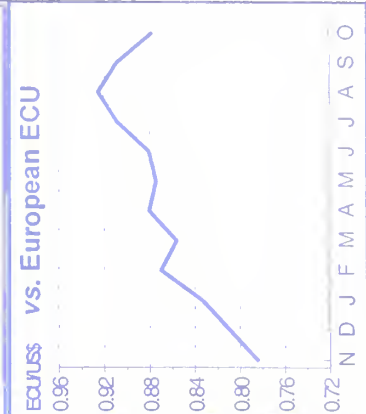
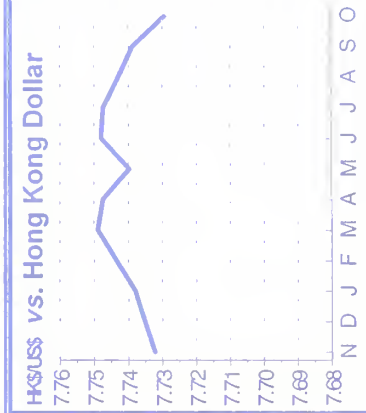
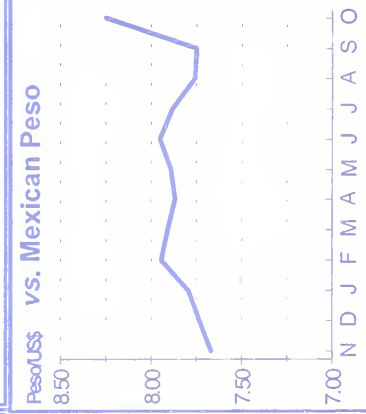
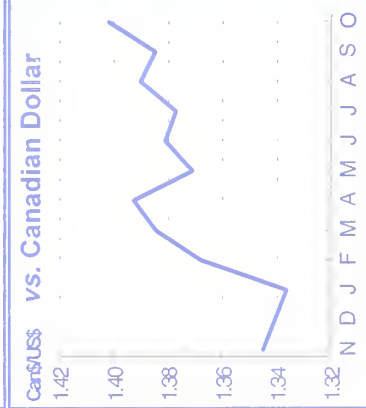
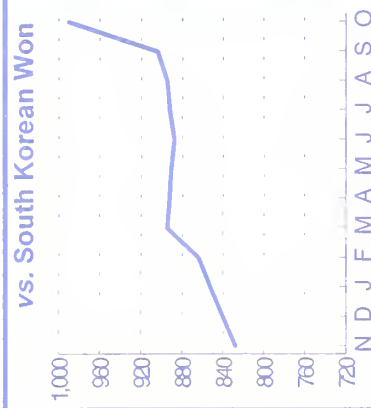
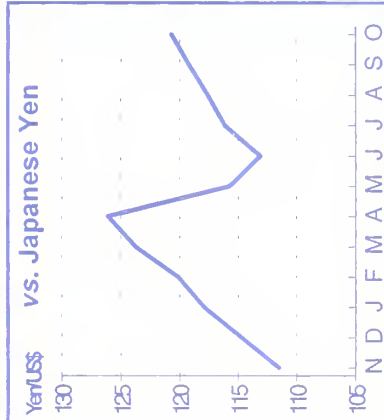
Top Ten Markets Summary



Note: Percentages are computed as the change from a year ago.
1/ Not included in agricultural totals.

Value Of U.S. Dollar Against Major World Currencies

Daily Spot Quotations & Monthly Averages



Currencies	Current Rate 10/29/97	Month Ago 9/30/97	Year Ago 10/96	% Change Year Ago 10/96
Argentine Peso	.9986	.9986	.9988	-0.02
Australian Dollar	1.4308	1.3795	1.2641	3.72
Brazilian Real	1.1035	1.0945	1.0310	10.75
Canadian Dollar	1.4019	1.3778	1.3601	1.75
Hong Kong Dollar	7.7295	7.7423	7.7321	-0.16
Japanese Yen	120.72	121.79	111.48	0.89
Mexican Peso	8.2500	7.7550	7.5350	6.38
Taiwan Dollar	30.835	28.601	27.490	7.81
South Korean Won	990.25	909.80	820.90	8.84
European ECU	.87850	.73997	.80051	9.74
-British Pound	.5981	.6235	.6388	-6.37
-French Franc	5.7900	6.0420	5.1825	11.72
-German Mark	1.7295	1.7965	1.5311	3.73

NOTE: Exchange rates are daily spot quotes as of 3:00 PM Eastern Time, October 29, 1997.
Source: CMP/OA/FAS Exchange Rate Database and Wall Street Journal.

USDA Trade Show Calendar

Food & Hotel Philippines

February 18-21, 1998
Manila, Philippines

● The Philippines continues to emerge as one of the brightest prospects in Asia for growth in U.S. consumer-oriented foods exports.

Commerce Tours International
870 Market Street, Suite 920
San Francisco, CA 94102
Tel: 415-433-3072
Fax: 415-433-2820

USDA Contact:

Tobitha Jones
Tel: 202-690-1182
Fax: 202-690-4374
E-mail: joneste@fas.usda.gov

MEFEX '98

February 28-March 3, 1998
Bahrain Int'l Exhibition Center
Manama, Bahrain

● Number of visitors: 5,126
MEFEX is the Middle East's longest running show at the heart of the US \$8 billion Gulf Cooperation Council food and beverage market.

Russell Hood
IMEX Management
6525 Morrison Boulevard, Suite 402
Charlotte, NC 28211
Tel: (704) 365-0041
Fax: (704) 365-8426

USDA Contact:

Gary Fountain
Tel: 202-720-7417
Fax: 202-690-4374
E-mail: fountain@fas.usda.gov

Alimentaria '98*

March 2-6, 1998
Barcelona, Spain

● Number of visitors: 140,000
Alimentaria is the largest food exposition in Iberia, held biennially and alternating between Spain and Portugal.

USDA Contact:

Heather Grell
Tel: 202-205-3771
Fax: 202-690-4374
E-mail: grell@fas.usda.gov

Foodex Japan '98

March 10-13, 1998
Nippon Convention Center (Makuhari Messe)
Tokyo, Japan

● Number of visitors: 87,716
An essential and comprehensive stop for any business entering Japan's market.

Japan Management Association
3-1-22, Shibakoen Minato-Ku
Tokyo, Japan
Tel: 011-03-3434-0093
Fax: 011-03-3434-8076

USDA Contact:

Maria Nemeth-Ek
Tel: 202-720-3623
Fax: 202-690-4374
E-mail: nemeth@fas.usda.gov

Great American Food Show-Korea*

March 17-19, 1998
Seoul, Korea

● Number of visitors: 3,500
Philip A. Shull
Agricultural Trade Office-Seoul
82 Sejong-Ro, Chongro-Ku
Seoul, Korea 110-050
Tel: 011-822-397-4297
Fax: 011-822-738-7147

...Trade Show Calendar

USDA Contact:

Teresina Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

Food & Hotel Asia '98

April 14-17, 1998
World Trade Centre
Singapore, Singapore

● Number of visitors: 36,000

Food & Hotel Asia is the largest show held in Southeast Asia. It attracts buyers from Malaysia, Indonesia, Thailand, and the Philippines.

Commerce Tours International, Inc.
870 Market Street, Suite 918
San Francisco, CA 94102
Tel: (415) 433-3072
Fax: (415) 433-2820

USDA Contact:

Teresina Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

U.S. Food Export Showcase

May 3-6, 1998
McCormick Place
Chicago, IL

U.S. Food Export Showcase Management
2751 Prosperity Ave., Suite 100
Tel: 703-876-0900
Fax: 703-876-0904

Food & Hotel Africa '98*

August 23-26, 1998
Gallagher Estate, Johannesburg

● Number of visitors: 7,000

An essential gateway to the African Market.

USDA Contact:

Tobitha Jones
USDA Foreign Agricultural Service
14th Street & Independence Ave., SW
Washington, DC 20250-1052
Tel: 202-690-1182
Fax: 202-690-4374
E-mail: joneste@fas.usda.gov

*USDA Sponsored Shows:

USDA is involved in all aspects of show management and provides related services, including:

Assistance in sample product shipment, rental of floor space, booth design/layout, and marketing the show to potential exhibitors (primarily via mass mailing, invitations to special events, printing show directory) and hotel reservations for show participants.

USDA staff from Washington and the local U.S. Embassy provide support to exhibitors.

USDA Endorsed Shows:

USDA recommends these as best avenues to enter prospective market for consumer-oriented foods, and provides limited services related to these shows, including:

Marketing, mailing advertising material, referral to show organizer, setting up information booth or national pavilion, pre-show promotion, invitation of potential buyers.

Recommendation is based on market potential and commitment of USDA staff in the overseas posts. USDA staff overseas provides most of the related services.

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World Horticultural Products and U.S. Export Opportunities; and Tropical Products: World Markets and Trade (all available electronically after 3:00 p.m. Washington DC time on release day) as well as Sugar: World Markets and Trade; Livestock and Poultry: World Markets and Trade; Dairy: World Markets and Trade, and U.S. Planting Seed Trade (available within a week after release.)

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